

United Kingdom Travelers to
CALIFORNIA

Prepared for
California Tourism

By
CIC Research, Inc.
8361 Vickers Street
San Diego, CA 92111-2112



February 2007

EXECUTIVE SUMMARY

UNITED KINGDOM TRAVELERS TO CALIFORNIA

Total Market. Of 4,345,000 United Kingdom visitors to the U.S., 17.9%, or 778,000 visited California in 2005. This represented a 12.3% increase from 2004, and a drop of 8% from the peak year of 1998. United Kingdom arrival volumes at California ports-of-entry are showing a decrease in 2006 after a small increase from 2004 to 2005.

	Visitors to CA from United Kingdom (est.)	United Kingdom to CA as % of total US
1994	654,000	23.6%
1995	592,000	20.5%
1996	688,000	21.2%
1997	815,000	21.9%
1998	843,000	21.2%
1999	816,000	19.2%
2000	767,000	16.3%
2001	631,000	15.4%
2002	660,000	17.3%
2003	693,000	17.6%
2004	693,000	16.1%
2005	778,000	17.9%

Main Destination. Almost three-fourths of all United Kingdom visitors to California (73%) reported California was the main destination of their U.S. trip. Leisure visitors from the United Kingdom reported a similar percentage (69%).

Purpose of Trip. Among all United Kingdom visitors to California in 2005, 74% reported vacation/holiday was one of their major reasons for traveling. Other reasons for traveling included visiting friends/relatives (38%), business (18%), and attending a convention (6%).

Visitors often report multiple purposes of trip. Most leisure visitors from the United Kingdom (84%) reported visiting California in 2005 on vacation/holiday. The proportion of leisure visitors who were visiting friends and relatives in 2005 was 40%.

Port of Entry. A combined total of 58% of United Kingdom visitors to California entered the U.S. through west coast ports. Just over one-third (34%) entered through Los Angeles, followed

by San Francisco (24%). The third highest port was Chicago which processed 8% of United Kingdom visitors to California.

Top Metropolitan Areas Visited in California. United Kingdom visitors to California in 2005 tended to center their trip itineraries on the major cities of San Francisco (54%) and Los Angeles (47%).

Leisure/Recreation Activities. The top leisure and recreation activities reported by visitors from the United Kingdom, whether traveling for business or leisure, were dining, shopping and sightseeing. United Kingdom travelers are more likely to visit small towns, go on guided tours, enjoy water sports or sunbathing, visit ethnic heritage sites, go snow skiing, and have ranch vacations than other overseas visitor groups.

Advance Trip Decision. United Kingdom travelers to California reported making their trip decision 139 days in advance of their trip. This is a much longer average trip decision time than the 90 days reported by all overseas visitors to California. United Kingdom leisure travelers made their trip decision 160 days in advance of their trip.

Means of Booking Air Trip. Only two-fifths of United Kingdom travelers to California (41%) booked their air trip via a travel agent, down from 45% in 2004. This was lower than the other major overseas markets to California (57%).

Means of Booking Lodging. About 27% of all United Kingdom visitors and 31% of United Kingdom leisure travelers pre-booked their lodging via a travel agent. In 2005 14% of United Kingdom travelers reported booking lodging through a hotel/motel directly. About 15% of leisure United Kingdom travelers booked their accommodations through the hotel/motel directly.

Trip Information Sources. Among United Kingdom visitors to California, the most frequently mentioned sources of information included: a travel agency (42%), followed by personal computer (39%), direct information from airlines (21%), friends/relatives (14%), and travel guides (13%).

Length of Stay. United Kingdom visitors stayed an average of 15.0 nights in the U.S. and 7.3 nights in California. In comparison the length of stay for all overseas visitors to California was 10.6 nights in the state.

Sex and Age. Men comprised 54% of United Kingdom travelers to California with a median age of 43 years. This is about the same median age reported by all overseas visitors to California (42 years). Women represented 46% of all United Kingdom travelers to California in 2005, with a median age of 43 years compared to 40 years reported by all overseas female visitors. Looking at leisure travel only, about 47% of United Kingdom leisure travelers to California are men and 53% are women.

Travel Party Size. Nearly all (95%) of United Kingdom travel groups consist of adults only. Only 5% of United Kingdom travel groups to California include children. The mean travel party size for all United Kingdom visitors to the state was 1.7 people and the party size for leisure visitors was 1.9 people.

Annual Household Income. Visitors from the United Kingdom reported higher median household incomes (\$98,600) relative to all overseas visitors to California (\$78,800). The median household income of United Kingdom leisure visitors to California was (\$88,800).

Accommodations. Most of United Kingdom visitors (89%) to California chose a hotel or motel as their primary type of accommodation during their stay in 2005. This proportion is higher than the 79% reported by all overseas visitors to California. United Kingdom leisure visitors reported the same likelihood to stay in a hotel/motel (88%). A somewhat low 23% of all United Kingdom visitors and 24% of United Kingdom leisure visitors stayed in a private home in 2005.

Use of Prepaid Package. In 2005, 22% of United Kingdom visitors and 27% of United Kingdom leisure visitors used prepaid packages.

Expenditures. Visitors to California from the United Kingdom spent an estimated 591 million dollars in California in 2005. United Kingdom visitors were spending an average of \$104 per day during their visit. Leisure visitors from the United Kingdom spent an average of \$95 per day. Each visitor to California from the United Kingdom spent an average of \$759 in the state, and each leisure visitor spent an average of \$713 in California.

Average International Airfare. Average international airfare to the U.S. was \$1,345 for United Kingdom visitors and \$1,095 for leisure visitors.